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sugar

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WORLD SUGAR PRODUCTION BELOW CONSUMPTION IN 1979/80

Summary

The world sugar outturn in 1979/80 is expected to be an estimated 87.7 million metric tons, 3.3 million tons below estimated world consumption of 91.0 million tons. World sugar stocks will be drawn down accordingly, but will remain large.

World sugar production during 1979/80 is about 3.2 million tons below the 90.9 million tons produced a year earlier—a decline resulting from decisions by some countries to curtail output for various reasons and unfavorable weather conditions in others.

Since several of the major producing countries have not yet begun harvesting their 1979/80 sugar crop, changes in the weather patterns can have a decided impact on the level of output in these countries and in the world. Based past experience, the chances are 2 out of 3 that this first estimate of world output will not vary more than 2 percent from the actual final outturn.

World cane sugar production of 53.4 million tons in 1979/80 is about 2.1 million tons below the year-earlier total. World beet sugar output of 34.3 million tons is 1.1 million tons below the level reached the year before.

Declines in sugar production will be large in India and Brazil. Other notable decreases will be in Cuba, the Soviet Union, the United States, Spain, and Thailand. Modest increases will occur in Peru, France, the United Kingdom, Yugoslavia, Indonnesia, and Pakistan.

World output of noncentrifugal sugar in 1979/80 will be slightly above the level of the year before. The major increase is expected in India, while Pakistan and Mainland China will have small decreases.

World industrial molasses output in 1979/80 is projected to decline more than 1.5 million tons from the year-earlier total. The largest decreases will be in Brazil, the Soviet Union, India, and Thailand. Increases are expected to be reigstered in Mexico and France.

Sugar

NORTH AMERICA

Production in North America, including the Caribbean, will down 4 percent in 1979/80, but the situation in individual countries shows considerable variation from that figure.

Costa Rica. Production should be up slightly, primarily as a result of greater area harvested. This expansion of area has followed increases in grinding capacity in recent years. A small but increasing amount of anhydrous alcohol is being produced from sugarcane for use in automobiles. In September the Government reduced the export tax on sugar, a move that should benefit growers and encourage production.

Dominican Republic. Production is expected to be up slightly in 1979/80. With exports projected at the 1978/79 level and consumption up slightly, there should be a further drawdown in stocks.

El Salvador. Another drop in planted area is foreseen in 1979/80 as grain crops gain favor over sugarcane, reportedly because of relatively poor cane prices in recent years. Sugar output is projected at 250,000 tons, down about 8 percent. Exports, however, are expected to be up as a result of better world prices. Stocks levels should then drop well below the high levels of recent years. The downward trend in produc-

tion could be halted in 1980/81 if the recent strengthening of prices continues.

Guatemala. Production in 1979/80 now appears to be up considerably over the poor year of 1978/79, when a number of mills did not operate. Area planted to cane is expected to be the same as in 1978/79, but with better world prices, it is thought that more mills will be in operation and harvested area up.

Honduras. The sugar industry continues to expand its area planted in order to supply the increasing grinding capacity of the mills. Sugar output in 1979/80 is projected at 185,000 tons, up 16 percent from the 1978/79 level. Area planted to sugarcane continues to grow at about 10 percent per year.

Mexico. Production is projected to be up again in 1979/80, largely as a result of an anticipated increase in harvested area. Sugarcane production in 1978/79 reached a record level but a considerable amount of this will be havested in 1979/80. The lower sugar yield from cane in 1978/79 was brought on by poor early season growing conditions and a decline in the average industrial extraction rate. Estimates of exports in 1978/79 have been revised downward because of cancellations required to maintain domestic availabilities. Domestic consumption is increasing rather rapidly, largely because of growing industrial requirements. Mexico and Cuba recently signed an agreement covering an exchange of technical and economic assistance for the development of the sugar industry of both countries. On the organizational side, the official sugar agency, ONISA, was abolished on October 1, 1979. The administration of all publicly owned sugar mills will now be the responsibility of the National Sugar Commission.

Nicaragua. Sugar production in 1979/80 is likely to be little changed from the 1978/79 level. The sugar industry reportedly sustained little damage during the recent civil war. However, there was disruption in the industrial use sector, with a resulting reduction in domestic consumption projections. A new simi-autonomous national organization, Empresa Nicaraguense del Azucar (ENAZUC), has been established to oversee sugar exports and export policy, while another Government agency—Agroindustrias de la Reforma Agraria—is to administer sugar mills and canefields owned by individuals in the previous government.

Trinidad and Tobago. Following what is described as a 28-year low in 1978/79, there are expectations that the industry will rebound in 1979/80. Area under cane may actually show a decrease but it is hoped—through a newly formed Sugar Industry Rationalization Committee—to do something about problems that were responsible for the poor year in 1978/79, namely: (1) Maintenance problems at mills, (2) very dry weather during the first quarter of 1979, (3) lack of both skilled and unskilled labor, and (4) increasing incidences of uncontrolled cane fires.

United States. Production is expected to be down almost 8 percent, largely as a result of a drop of more than 10 percent in planted sugar beet area following factory closings.

SOUTH AMERICA

Argentina. Planted area is estimated to have dropped 14 percent in 1979/80 in response to lower production quotas set by the Government to try to keep output and export availabilities closer to International Sugar Agreement (ISA) export quotas. Sugar production, however, is still projected to be up slightly at 1.4 million tons. Weather conditions have been favorable. The government continues to allow surplus cane to be processed into alcohol.

Bolivia. A big crop in 1978/79 resulted in oversupplies, which brought Government and industry efforts to reduce planted area in 1979/80. Present indications are for a sugar outturn some 12 percent lower than last year.'s. The total production level, as established by degree and allotted to mills, is 276,747 tons. Mills have contracted with growers for smaller amounts and some marginal producers reportedly have abandoned cane production.

Brazil. In spite of a large sugarcane crop for the 1979/80 season, Brazil's Sugar and Alcohol Institute has authorized total sugar production of only 6.94 million tons, down 10 percent from the 1978/79 level. One of the primary reasons for this move is said to be the existence of substantial carryover stocks. Exports during the first 6 months of 1979 totaled 809,000 tons, compared with 936,000 tons during the same period in 1978 and 2 million tons in calendar 1978.

Brazil continues to give considerable emphasis to alcohol production from sugarcane for admixing with gasoline. Production for the 1979/80 crop year is authorized at 3.8 billion liters. Also authorized are exports of 500 million liters. The outlook for continued expansion of alcohol production is good.

Chile. Production is expected to be down again in 1979/80 primarily because of a further declined in planted sugarbeet area. Several new measures have been adopted to encourage beet production, including new price conditions, but these may not have been in time to affect 1979/80 output.

Colombia. It appears the production situation will change little in 1979/80 from the 1978/79 level. Exports may be a little heavier in an attempt to reduce stock levels. The Government is giving increased attention to the possibilities of gasahol production. Presently the Ministry of Agriculture and the Colombian National Petroleum Company are involved in a joint study to determine which of four agricultural products (including sugar) would be most economic.

Ecuador. An increase in planted area should mean an increase in sugar output of more than 10 percent in 1979/80. The Government in May 1979 granted a subsidy in the form of tax exemption certificates on sugar exports. These certificates will cover the difference between the f.o.b. value of exports and the cost of production. The f.o.b. value will be determined by the Ministry of Industries based on world market prices, while production costs will be determined by the Ministry of Finance.

Guyana. After a disappointing final output in 1978/79, Guyana looks for production in 1979/80 to rebound to about 350,000 tons. With this increased production, Guyana hopes to meet its quota to the European Community (EC) in 1980. Exports fell short in 1978 and 1979. Increased sugar production, through higher yields, remains a priority goal.

Peru. Production is expected to be up considerably in 1979/80, given continued favorable weather. Exports from the poor 1978/79 crop are expected to total some 225,000 tons, the lowest level in many years. Stocks at the end of 1979 are expected to be only about one-half those of a year earlier.

Venezuela. Sugar production should be up somewhat in 1979/80 but still far below the country's consumption needs—a major concern of the industry and the Government. In an effort to correct this situation, the Government in April 1979 raised the price to the farmer for sugarcane. In addition, it established a bonus for each ton of cane produced and another bonus for sucrose yield beyond a certain minimum. Nevertheless, it seems evident that Venezuela will not be exporting sugar for some time to come.

WESTERN EUROPE

Belgium. Sugar outturn is likely to be down slightly in 1979/80 as some beets move to the Netherlands for processing. Exports in 1979/80 are projected at 700,000 tons. In 1978/79, a large portion of increased exports went to Africa and Asia. Domestic consumption is expected to show some recovery but yearend stocks could be up 25 percent.

France. Good weather in August and September is believed to have increased both beet yields and sucrose content, so sugar production should be up in 1979/80. Exports may be up more than 10 percent, including increases to both EC and non-EC destinations.

Federal Republic of Germany. Production probably will be down slightly in 1979/80 as area is cut back in expectation of lower EC production quotas. Also, beet yield per hectare is down from the high of 1978/79. Beet quality is reportedly good, however, and the extraction rate appears to be up. Exports in 1979/80 are expected to toal about 700,000 tons, compared with 771,000 in 1978/79. Of the latter figure, 75 percent went to non-EC countries—especially Switzerland, Nigeria, Algeria, and Iran. Domestic consumption of sugar was down in 1978/79 and little change is expected in 1979/80.

Italy. Little change is expected in the sugar production situation during 1979/80. Though area planted and beet production are up slightly from last year's, the sugar content is expected to be down. Planted area is forecast at 275,000 hectares. Italy's National Agricultural Plan (for 1978-1987) calls for total area of 300,000 hectares by 1983 and beet production of 13.8 million tons (vs. 12.5 million estimated for 1979/80). Domestic sugar consumption is forecast at about 1.76 million tons in 1979/80 and production at 1.62 million, with the remainder to come from imports.

Netherlands. Smaller area planted, reduced beet yields, and a lower extraction rate will mean a sugar outturn 15 percent or more below the 1978/79 level—a situation blamed on a wet, cold spring plus late sowing. Imports in 1979/80 should remain at about 800,000 tons, while exports and yearend stocks may be down.

United Kingdom. Production is expected to be up slightly in 1979/80 because of favorable weather conditions. Harvested areas is also up about 2 percent. Stocks are reported up as a result of increased production and imports. The higher imports were basically from ACP countries and more than met the UK's commitment under the Lome Convention.

Austria. Both area planted to sugarbeets and sugar output are up in 1979/80, despite the burdensome stocks that have brought efforts to reduce planted area further. Nevertheless, both production and stocks were down from levels of 2 years ago. If exports continue at last year's level, there should be a further stock reduction this year. In 1978/79 exports went largely to West Germany, Italy, and Norway. Also important are Austria's "invisible" exports—i.e., exports of sugar-containing products.

Finland. Production is up slightly in 1979/80, but still below consumption needs. Stocks are relatively high, however, so imports will be decreased in order to bring that stock figure down to a more workable level.

Greece. Output should be up a little from 1978/79. Exports are also expected to be up in an effort to reduce Government-held stocks. Prices to producers for sugarbeets are being gradually moved up to bring them in line with EC policies.

Spain. Reduction in planted sugarbeet area coupled with adverse weather conditions are expected to reduce Spain's sugar output in 1979/80 by more than 25 percent. As a result of this decline the Government appears to be revising its restrictive production policies in an effort to bring production and consumption more nearly in balance. Imports are expected to

run about the same in 1979/80 as in 1978/79, so there is likely to be a heavy drawback in stocks.

Sweden. Based on a normal sugar content, sugar production should be about the same in 1979/80 as a year earlier. The official contract area was set at 51,500 hectares, but actual plantings went slightly beyond this figure. The official contract area is set up each year to allow 10-15 percent of total demand to be supplied by imports, preferably from developing countries. Imports are expected to be up in 1979/80, as are exports.

Switzerland. Swiss production of sugarbeets and sugar continues to trend upward, with present production of refined sugar now meeting about 40 percent of the country's needs. Imports in 1979/80 are expected to be down slightly as a result of increased production and high stock levels.

EASTERN EUROPE

Czechoslovakia. Though 1979/80 production will fall somewhat below the goal for the year, sugar output should still be up slightly. A severe spring drought was the principal obstacle to meeting the target.

German Democratic Republic. While sugarbeet production appears to be declining, sugar output is showing some increase, thereby indicating better extraction rates. The 1979/80 crop suffered from weather vagaries during the spring and summer but entered the fall season in reasonably good condition. Imports from Cuba are expected to continue in 1979/80 and exports should be up as a result of overall increased availability of sugar.

Hungary. It now appears Hungary may meet its production target for 1979/80 and as a result import a little less sugar than during the year earlier. This is the first year in which sugarbeet prices will also include premiums for higher sugar content.

Poland. Sugar beet area was considerably below target this year, at least in part because of adverse weather conditions last spring. As a result, sugar output is forecast to be down almost 9 percent from the year-earlier level. Processing started in mid-September and there were special incentives for early delivery in an effort to avoid freezing of beets later in the fall. First indications are that the sugar content of beets is up. Reportedly, 77 sugar plants are in operation this year.

Yugoslavia. Preliminary indications are that sugar production will be up about 10 percent in 1979/80 to a record 840,000 tons—an increase attributed to larger area and higher yields of beets per hectare. About 28 percent of the total area planted is now in the private sector. Any future area expansion will probably have to come in this sector. However, the prospect of such expansion is questionable as long as other crops remain more profitable in terms of income per hectare. Exports are likely to be up considerably in 1979/80, based on increased production and more-than-adequate stock levels.

Soviet Union. Presently, it appears that not more than 8.5 million tons will be produced in 1979/80.The sugarbeet crop was adversely affected by considerable weather-related problems. The late, wet spring was followed by about 2 months of drought conditions in most of the major beet producing areas of the country. This situation indicated in mid-July that production would fall short of the previous year's level. However, rains in July and August, followed by above-normal temperatures in much of September in the Ukraine and some other important beet areas, raised prospects considerably. The pace of this year's harvest was generally ahead of last year's, but the usual problem of forcing the harvest—thereby leaving thousands of tons of beets stacked in fields—was evident. Below-freezing temperatures in many areas at the end of September may have had an effect on these beets.

AFRICA

Egypt. Area planted to sugarcane is up slightly in 1979/80, and output of sugar is expected to be about 670,000 tons. This increase will not cover the expected increase in consumption, however, so imports will probably also rise. A shortage of farm labor, problems of irrigation and drainage, and low farm prices are all cited as obstacles in attempting to expand sugar production.

A major policy change occured in late 1978, when the private sector was allowed to start importing sugar for industrial use. About 160,000 tons a year are estimated to be coming in through this channel.

Kenya. This country is now deemed to be self-sufficient in sugar, and future years are expected to bring increased availabilities for export. In 1979/80 imports are expected to be nil, exports about 5,000 tons, and stocks to increase some 37,000 tons. Domestic consumption is forecast at 272,000 tons. about 8 percent over the 1978/79 total. The Kenya Sugar Aughority is seeking to license cane growers in order to avoid overproduction and related problems. In recent years, some growers have been turned away from mills because of the lack of processing capacity.

Nigeria. Production is still limited, but could grow considerably as the Savannah Mill comes into full operation in 1980 and two other mills come into operation in 1981. Presently, Nigeria relies heavily on imports, with the total in 1979/80 expected to reach 385,000 tons. EC countries—especially France—have been the most important sources of imports.

South Africa. In spite of production control measures meant to reduce output to levels more compati-

ble with the country's ISA export quota, sugar production will probably be up slightly in 1979/80. A severe drought in some areas—especially Zululand—was more than offset by good crops in other areas and cane that had been left unharvested from the previous season. The effects of production control efforts were, however, particularly hard felt in the relatively new sugar areas.

Though the ISA quota has caused some marketing problems, South Africa does appear to be disposing of excess sugar in other forms such as high-test molasses and animal feed. However, these markets are uncertain and the industry is reportedly continuing to work toward a balance supply-dustribution situation. As a part of this situation, the whole question of alcohol (ethanol) production from sugarcane is being considered. Many problems are foreseen, however, including the fact that the Government has not yet spelled out a clear-cut energy policy.

Swaziland. Though small, the industry here is growing. Area planted to cane was up in 1979/80 and is expected to be up another 17 percent next year. Increased production is being aided somewhat by the provisions of the ISA that assist new industries in developing countries. Swaziland also has an advantage in the EC market through the Lome Convention. Nevertheless, the industry is still believed to face a difficult situation in the continuing development of this important foreign-exchange earner.

Tanzania. It continues to be Government policy to increase sugar production through large, state-owned farms, while at the same time accommodating small growers. Production in 1979/80 is forecast at 162,000 tons, or almost 20 percent over the 136,000 tons produced in 1978/79. A new sugar mill is being built at Kagera West Lake Region to replace one destroyed there in 1968.

Zaire. Production is expected to be up in 1979/80, and could cover more than 80 percent of domestic consumption needs. A new Chinese-financed sugar complex, with a production capacity of 15,000 tons a year, is scheduled to come into operation in 1981/82.

ASIA

Bangladesh. Output of centrifugal sugar probably will be up slightly in 1979/80. However, because of increasing consumption, about 15,000 tons of imported refined sugar will be needed. Gur (noncentrifugal sugar) production will also be up about 10,000 tons. Stocks will likely be drawn down during 1979/80. Bangladesh has not exported sugar since 1977/78.

China. It appears that the total sugar outturn will be down in 1979/80 from the year-earlier level. Although weather conditions were favorable in the beet areas, which led to a modest increase in beet sugar, the reverse was true in the cane areas of southern China. Total sugar output, as a result, was down as estimated 4.7 percent.

China's sugar consumption has been increasing. Imports have generally increased, while exports remain limited. Apparent consumption has increased markedly in recent years.

India. Centrifugal sugar output will be down about 11 percent during 1979/80, compared with the 1978/79 outturn—a result of a prolonged dry spell in the principal growing area. Prices for sugarcane used to produce milled white sugar have also declined over the past 2 years and ther has been a shift to more profitable crops. Meanwhile, gur and khandsari (native-type, semiwhite, centrifugal sugar) prices have risen, deverting more cane to these uses. Sugar exports are expected to decline in 1979/80, but centrifugal sugar consumption and stocks will, nonetheless, decrease as a result of lower supply.

Japan. A small increase in sugar output is anticipated during 1979/80 from the year-earlier level. Import requirements, therefore, will be larger in order to meet growing consumption needs. Ending stocks will also be down from the level of a year earlier.

Based on surveys as of August 1979, area planted to sugarbeets and sugarcane is up marginally from the year-earlier total. However, slightly higher beet yields will be partly offset by reduced cane yields.

Pakistan. Despite reduced area planted to cane and beet, sugar outturn in 1979/80 from both cane and beet will increase. Weather conditions have been more favorable this year than last. However, smaller beginning stocks, plus increased consumption, may result in imports of as much as 200,000 tons in 1979/80.

Philippines. The 1979/80 crop has benefited by slightly better-than-normal weather conditions. The 1979/80 planted area is 5 percent below the area harvested in 1978/79. However, higher yields in 1979/80 should result in an outturn around 2 percent above those of a year earlier.

Export availability will be about 1.2 million tons in 1979/80, compared with actual exports of 1.0 million tons in 1978/79. The United States was the main destination in 1978/79, taking nearly half of the total. Other important markets included South Korea, Japan, Mainland China, and Iraq.

The long-term outlook for the Philippine sugar industry is for production to increase moderately. This increase is likely to come from better productivity rather than expanded area.

Thailand. Some reduction in cane area is expected in 1979/80 as producers have shifted to crops with relatively higher prices. Yields will also decline because of a lack of moisture during the early part of the season, and sucrose content is expected to be down. Therefore, it is unlikely that production will be

sufficient to cover both ISA reserve stocks and export quota requirements after consumption needs are met.

Turkey. Some imports during 1979/80 are likely since consumption is increasing while output is stationary. Planted area did not meet the contracted level because of a scarcity of diesel fuel and unsatisfactory prices for beets.

Oceania

Australia. Production results will be little changed in 1979/80 from the year-earlier level. Cane will be left standing for the second consecutive year. Stocks are expected to increase again and will probably reach the 550,000-ton level by the end of 1979/80. Domestic consumption is expected to be about the same as in 1979/79.

Export availabilities will remain slightly over 2 million tons in 1979/80. A new agreement with the Republic of Korea, announced in September, raises the annual amount from 200,000 tons under the 1975-79 agreement to 240,000 tons for 1980-84.

Molasses

Cuba. It is anticipated that output will move downward for the second consecutive year in 1979/80. Exports also have been declining as production has decreased and domestic consumption has risen.

Mexico. Molasses exports are forecast at 625,000 tons in 1979/80, or about 7 percent below the year-earlier total. Efforts to increase domestic use of molasses in mixed animal feeds are resulting in a gradual reduction of exports. Production has increased steadily in recent years, but not as rapidly as consumption.

United States. Production is expected to decline in 1979/80 in line with reduced sugar output. U.S. imports of molasses were down in 1978—1.6 million tons, compared with 2.1 million tons a year earlier. Imports are not expected to recover in 1979.

Brazil. Output will be down in 1979/80 a sugar production continues to decline. Molasses consumption will be little changed in 1979/80 and exportable supplies will be less.

France. Molasses output should partially recover in 1979/80 from the off-year level of 1978/79. Most of the molasses supply is used in animal feed, followed by distilleries and production of yeast.

Societ Union. Molasses production will decline in 1979/80 because of reduced beet supplies, but the Soviet Union will still be virtually self-sufficient in molasses.

India. Molasses output will be down in 1979/80, along with sugar output.

Japan. Little change in molasses supply-distribution in likely from the year-earlier pattern.

Import requirements of some 870,000 tons in 1979/80 are nearly the same as they were a year earlier.

Philippines. Production in 1979/80 will be an estimated 2 percent above the 1978/79. However, increased domestic use for alcohol may reduce stocks in 1979/80.

Thailand. Prospects are for decreased exports of molasses in 1979/80 for the second consecutive year as production will be down while consumption will be slightly higher.

International Sugar Agreement

The International Sugar Council met in London on November 19 and 20. Actions taken included the setting of global export quotas for 1980, redistribution of 1979 quota shortfalls, postponing contributions to the stock financing fund (Article 51), and the admission of Ivory Coast as an exporting member.

The Council set the initial 1980 global quota for major exporting members at 12,909,000 tons, and subsequently raised the quota to 13,062,000 tons. Total free-market import needs were estimated at 17,789,000 tons. Exports of nonmembers to the free market were put at approximately 4.4 million tons, while smaller exporting members are expected to ship 400,000 tons.

On the subject of shortfalls, the Council went ahead with the redistribution that had been held up by the Executive Committee at its October 31 meeting. The total redistributed was 126,671 tons. However, it is considered unlikely that all will be used.

The Council postponed until April 1, 1980, the implementation of the stock financing fund provisions of the ISA in the hope that the United States will by that time have fully ratified the Agreement, including implementing legislation.

With regard to new members, the Council acted favorably on the Ivory Coast application for accession to the Agreement. There was no change in the non-member status of Colombia, a sizable producer.

The Council also passed a resolution noting a recent GATT panel report that found that the European Community systems of granting refunds on sugar exports had contributed to depressed prices in recent years and constituted a source of uncertainty in world suagr markets. The GATT panel was established following a complaint by Australia under GATT's Article XXIII. Brazil has since filed a similar complaint.

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CENTRIFUGAL SUGAR (RAW VALUE): PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1970/71-1974/75, ANNUAL 1975/76-1979/80 1/
(IN THOUSANDS OF METRIC TONS)

REGION AND COUNTRY	AVERAGE 1970/71-1974/75	1975/76	1976/77	1977/78	1978/79	1979/80 2/
NORTH AMERICA:						
BARBADOS	115	104	124	104	117	115
BELIZE	77	63	93	93	114	100
CANADA	120	141	165	147	125	114
COSTA RICA	170	174	195	191	195	203
CUBA	5,592	6,200	6,100	7,200	7,000	6,500
DOMINICAN REPUBLIC	1,141	1,249	1,222	1,164	1,190	1,200
EL SALVADOR	204	261	291	293	273	250
GUADELOUPE	107	96	91	87	96	107
GUATEMALA	284	529	517	410	376	425
HAITI	63	54	51	52	65	70
HONDURAS	66	91	107	131	159	185
JAMAICA	374	366	296	306	358	350
MARTINIQUE	21	14	14	13	21	16
MEXICO	2,653	2,698	2,696	3,029	3,058	3,100
NICARAGUA	167	246	224	214	212	214
PANAMA	100	142	177	175	225	220
ST KITTS	26	35	41	36	40	38
TRINIDAD-TOBAGO	197	204	176	148	144	163
US-CONTINENTAL (BEET)	3,016	3,646	3,534	2,820	2,945	2,631
US-CONTINENTAL (CANE)	1,257	1,657	1,519	1,497	1,441	1,387
US-HAWAII	1,031	953	938	934	1,002	962
US-PUERTO RICO	265	279	243	185	174	164
TOTAL	17,046	19,202	18,814	19,229	19,330	18,514
SOUTH AMERICA:						
ARGENTINA	1,275	1,349	1,592	1,665	1,387	1,400
BOLIVIA	141	286	267	277	314	277
BRAZIL	6,257	6,200	7,500	8,863	7,758	6,950
CHILE	168	319	290	121	95	73
COLOMBIA	810	965	882	915	1,052	1,052
ECUADOR	248	288	301	295	353	393
GUYANA	317	338	332	253	334	350
PARAGUAY	64	52	56	77	84	85
PERU	951	956	926	881	720	800
SURINAM	11	9	7	10	11	12
URUGUAY	89	94	125	113	93	80
VENEZUELA	517	462	443	325	325	375
TOTAL	10,847	11,318	12,721	13,795	12,526	11,847
WESTERN EUROPE:						
EC:						
BELGIUM-LUXEMBOURG	718	722	744	798	888	875
DENMARK	343	423	410	558	435	439
FRANCE	3,017	3,239	2,974	4,268	4,065	4,174
GERMANY, WEST	2,326	2,540	2,734	3,076	2,998	2,930
IRELAND	167	204	189	183	201	180
ITALY	1,171	1,455	1,748	1,389	1,616	1,623
NETHERLANDS	787	914	945	890	1,019	856
UNITED KINGDOM	958	697	755	1,032	1,113	1,200
TOTAL EC	9,489	10,194	10,499	12,194	12,335	12,277
AUSTRIA	355	512	438	520	375	382
FINLAND	74	77	80	75	104	109
GREECE	164	307	385	295	351	353
PORTUGAL (AZORES & MADEIRA)	28	17	10	11	10	10
SPAIN	827	934	1,376	1,183	1,105	814
SWEDEN	269	277	302	326	322	321
SWITZERLAND	70	64	83	84	105	110
TOTAL	11,277	12,382	13,173	14,688	14,707	14,376
EASTERN EUROPE:						
ALBANIA	18	21	22	21	21	21
BULGARIA	241	250	285	275	275	265
CZECHOSLOVAKIA	770	750	673	924	970	1,000
GERMAN DEMOCRATIC REP	629	650	600	782	700	725
HUNGARY	310	350	388	469	530	550
POLAND	1,684	1,860	1,801	1,819	1,736	1,587
ROMANIA	519	560	800	609	650	700
YUGOSLAVIA	448	489	650	738	765	840
TOTAL	4,619	4,930	5,219	5,637	5,647	5,688
TOTAL EUROPE	15,896	17,312	18,392	20,325	20,354	20,064
SOVIET UNION	8,484	7,700	7,350	8,825	9,000	8,500
AFRICA:						
ANGOLA	78	60	50	60	65	65
EGYPT	554	642	639	667	657	670
ETHIOPIA	141	165	180	150	165	170
KENYA	143	172	161	194	259	337
MADAGASCAR	110	114	107	110	112	115
MAURITIUS	663	496	731	705	705	745
MOROCCO	216	350	345	271	375	375
MOZAMBIQUE	352	216	200	260	250	250
REUNION	222	246	260	261	286	278
RHODESIA	205	265	250	275	275	280
SOUTH AFRICA	1,764	1,802	2,166	2,211	2,210	2,228
SWAZILAND	187	223	229	238	257	274
TANZANIA	99	102	101	101	130	162
UGANDA	93	30	30	15	10	12
ZAIRE (CONGO,K)	59	68	46	58	52	57
OTHER 3/	395	508	578	596	609	653
TOTAL	5,280	5,459	6,073	6,172	6,417	6,671

FOOTNOTES AT END OF TABLE --CONTINUED

DECEMBER 1979 COMMODITY PROGRAMS, FAS, USDA

CENTRIFUGAL SUGAR (RAW VALUE): PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1970/71-1974/75, ANNUAL 1975/76-1979/80 1/--Continued
(IN THOUSANDS OF METRIC TONS)

REGION AND COUNTRY	AVERAGE 1970/71-1974/75	1975/76	1976/77	1977/78	1978/79	1979/80 2/
ASIA:						
BURMA	106	120	120	130	130	135
CHINA, MAINLAND 4/	2,182	2,311	2,153	2,450	2,675	2,550
CHINA, TAIWAN	800	817	1,123	768	891	890
INDIA 5/	4,729	5,464	6,043	8,217	7,343	6,524
INDONESIA	862	1,030	1,068	1,125	1,159	1,325
IRAN	615	713	745	686	683	640
JAPAN	563	471	565	630	693	697
NANSEI-NANPO (RYUKYU)	70	6/	6/	6/	6/	6/
PAKISTAN	525	632	741	922	653	749
PHILIPPINES	2,292	2,875	2,753	2,397	2,347	2,383
THAILAND	760	1,641	2,212	1,584	1,828	1,260
TURKEY	787	971	1,264	1,065	1,079	1,070
OTHER 7/	199	343	393	476	449	468
TOTAL	14,490	17,388	19,180	20,450	19,930	18,691
OCEANIA:						
AUSTRALIA	2,786	2,988	3,405	3,322	2,965	2,975
FIJI	310	292	328	361	347	400
TOTAL	3,097	3,280	3,733	3,683	3,312	3,375
WORLD TOTAL	75,140	81,659	86,263	92,479	90,869	87,662

1/ Crop years are on a September/August basis, but include the outturn of sugar from harvests of several Southern Hemisphere countries which begin prior to September. Refined beet sugar is generally converted to raw value by multiplying by 1.087, while refined cane sugar is multiplied by 1.07 to obtain the raw value equivalent. 2/ Preliminary. 3/ Other Africa includes Algeria, Cameroon, Congo (Brazzaville), Ghana, Ivory Coast, Mali, Malawi, Nigeria, Senegal, Somali Republic, Sudan, Tunisia, and Zambia. 4/ May contain some non-centrifugal sugar. 5/ Includes khandsari. 6/ Since January 1, 1972, included in Japan. 7/ Other Asia includes Afghanistan, Bangladesh, Iraq, Israel, Lebanon, Malaysia, Nepal, Sri Lanka, Syria, and Vietnam.

Source: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source material, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

NON-CENTRIFUGAL SUGAR: 1/ PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1970/71-1974/75, ANNUAL 1975/76-1979/80 2/
(IN THOUSANDS OF METRIC TONS)

REGION AND COUNTRY	AVERAGE 1970/71-1974/75	1975/76	1976/77	1977/78	1978/79	1979/80 3/
NORTH AMERICA:						
COSTA RICA	38	40	45	45	48	50
EL SALVADOR	12	16	16	10	12	12
GUATEMALA	51	54	37	36	35	35
MEXICO	105	65	65	50	55	50
NICARAGUA	12	10	10	10	10	10
PANAMA	4	3	2	3	3	3
TOTAL	222	188	175	154	163	160
SOUTH AMERICA:						
BRAZIL	271	200	200	200	200	200
COLOMBIA	672	829	735	818	910	920
ECUADOR	40	40	42	45	50	55
PERU	13	13	14	13	15	15
VENEZUELA	29	38	39	40	42	45
TOTAL	1,026	1,120	1,030	1,116	1,217	1,235
ASIA:						
BURMA	140	135	138	140	140	140
CHINA, MAINLAND	764	820	825	830	860	800
CHINA, TAIWAN	26	27	30	42	40	38
INDIA	6,295	6,200	6,200	6,800	6,800	7,300
INDONESIA	191	200	200	225	225	200
JAPAN	11	12	11	12	11	14
NANSEI-NANPO (RYUKYU)	6	4/	4/	4/	4/	4/
PAKISTAN	1,313	1,445	1,450	1,450	1,550	1,200
PHILIPPINES	57	54	51	60	68	74
THAILAND	312	370	700	600	650	750
VIETNAM	10	10	10	11	10	10
TOTAL	9,124	9,273	9,615	10,170	10,354	10,526
WORLD TOTAL	10,372	10,581	10,820	11,440	11,734	11,921

1/ Non-centrifugal sugar includes all types of sugar produced by other than centrifugal process which is largely for consumption in the relatively few areas where produced. The estimates include such kinds known as piloncillo, panela, papelon, chancaca, radura, jaggery, gur, muscovado, panocha, etc. 2/ Years shown are last year's crop-harvesting season. For chronological arrangements here all campaigns which begin not earlier than September of one year, nor later than August of the following year, are placed in the same crop-harvesting year. The entire season's production of each country is credited to the September/August year in which harvesting and sugar production began. 3/ Preliminary. 4/ Since January 1, 1972, included in Japan.

Source: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research and related information.

SUGAR, CENTRIFUGAL (RAW VALUE): IMPORTS BY SPECIFIED COUNTRIES, AVERAGE 1972-76, ANNUAL 1977 and 1978
(In 1,000 metric tons)

Continent and Country	Average 1972-76	1977	1978 1/
North America:			
Canada	933	1,064	1,083
United States	4,488	5,290	3,616
Total North America	5,421	6,354	4,699
South America:			
Chile	209	342	295
Venezuela	35	124	275
Total South America	244	466	570
Europe:			
Belgium & Luxembourg	25	77	61
Denmark	19	21	16
Finland	173	157	155
France	141	110	117
Germany, West	146	108	152
Iceland	10	12	14
Ireland	46	53	36
Italy	578	429	390
Malta	17	18	18
Netherlands	72	75	48
Norway	154	179	178
Portugal	273	264	339
Spain	123	139	51
Sweden	99	69	13
Switzerland	166	255	162
United Kingdom	2,186	1,870	1,689
Total West Europe	4,228	3,836	3,439
Bulgaria	228	215	215
Czechoslovakia	123	64	80
German Democratic Rep.	246	233	212
Hungary	174	91	59
Poland	26	30	60
Romania	82	204	0
Yugoslavia	268	85	0
Total East Europe	1,147	922	626
Total Europe	5,375	4,758	4,065
Soviet Union (Europe and Asia)	2,682	4,776	3,993

Continent and Country	Average 1972-76	1977	1978 1/
Africa:			
Algeria	288	431	411
Egypt	139	221	509
Ghana	47	34	39
Kenya	66	39	49
Libya	96	116	141
Morocco	262	389	294
Nigeria	124	380	595
Sierra Leone	20	17	28
Sudan	127	151	220
Tanzania	30	21	36
Tunisia	137	170	210
Total Africa	1,336	1,969	2,532
Asia:			
Afghanistan	51	50	52
China, Mainland	567	1,676	1,438
Cyprus	15	17	18
Hong Kong	77	96	111
Indonesia	140	237	460
Iran 2/	283	277	875
Iraq	371	480	431
Israel	136	153	195
Japan	2,566	2,708	2,284
Jordan	60	45	86
Korea, South	299	403	566
Lebanon	60	172	78
Malaysia	347	336	398
Pakistan	51	11	1
Singapore	123	132	110
Southern Yemen, Rep. of	36	55	106
Sri Lanka	124	100	176
Syria	162	124	182
Vietnam	214	180	94
Total Asia	5,682	7,252	7,661
Oceania:			
New Zealand 3/	186	185	158
Papua New Guinea	20	26	29
Total Oceania	206	211	187
Total	20,946	25,786	23,707

1/ Preliminary. 2/ Iranian calendar year, beginning March 21 of year shown. 3/ Ending June 30 of year shown.

Source: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

December 1979 Commodity Programs, FAS, USDA

SUGAR, CENTRIFUGAL, (RAW VALUE): EXPORTS BY SPECIFIED COUNTRIES, AVERAGE 1972-76, ANNUAL 1977 AND 1978
(In 1,000 metric tons)

Continent and Country	Average 1972-76	1977	1978 1/
North America:			
Belize	74	86	117
Canada	53	145	136
Costa Rica	80	74	87
El Salvador	129	169	133
Guatemala	174	294	153
Honduras	7	25	23
Mexico	357	0	74
Nicaragua	99	100	104
Panama	63	119	126
United States	67	20	13
Caribbean:			
Barbados	90	106	89
Cuba	5,187	6,238	7,231
Dominican Republic	1,015	1,117	937
Haiti	14	0	5
Jamaica	262	220	203
St. Kitts	25	38	39
Trinidad and Tobago	153	140	103
Total North America	7,849	8,891	9,573
South America:			
Argentina	310	958	367
Brazil	2,046	2,487	1,925
Colombia	143	(2/)	132
Ecuador	62	56	40
Guyana	287	211	295
Peru	406	434	266
Total South America	3,254	4,146	3,025
Europe:			
Belgium & Luxembourg	323	532	509
Denmark	445	263	306
Finland	47	62	23
France	1,139	1,816	2,357
Germany, West	301	713	802
Ireland	38	65	40
Netherlands	84	212	252
United Kingdom	325	178	93
Total West Europe	2,702	3,841	4,382
Czechoslovakia	188	171	306
German Democratic Rep.	119	91	81
Poland	276	271	282
Romania	70	164	92
Total East Europe	653	697	761
Total Europe	3,355	4,538	5,143
Soviet Union (Europe and Asia):	73	87	174
Africa:			
Congo (Brazzaville)	27	16	5
Madagascar	32	28	24
Mauritius	625	674	613
Mozambique	148	208	36
Reunion	29	54	47
Rhodesia	111	60	0
South African Rep.	902	1,384	719
Swaziland	177	211	226
Total Africa	2,051	2,635	1,670
Asia:			
China, Mainland	88	41	39
China, Taiwan	492	599	364
India	603	276	687
Philippines	1,339	2,443	1,142
Thailand	572	1,657	1,029
Turkey	26	--	4
Total Asia	3,120	5,016	3,265
Oceania:			
Australia 3/	1,979	2,558	2,002
Fiji	262	324	293
Total Oceania	2,241	2,882	2,295
Total	21,943	28,195	25,145

--Denotes not available.

1/ Preliminary. 2/ Less than 500 metric tons. 3/ Crop year ending June of year shown.

Source: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research and related information.

December 1979 Commodity Programs, FAS, USDA

MOLASSES, INDUSTRIAL: IMPORTS OF SPECIFIED COUNTRIES, AVERAGE 1971-75 AND ANNUAL 1976 THROUGH 1978
(In metric tons)

Continent and country	Average 1971-75	1976	1977	1978 1/
North America:				
Canada 2/	160,539	125,657	157,222	147,974
United States	2,028,083	2,292,332	2,107,981	1,577,486
Total	2,188,622	2,417,989	2,265,203	1,725,460
Europe:				
Austria	37,248	49,273	80,995	69,685
Belgium and Luxembourg	154,961	329,537	338,293	300,670
Denmark	6,721	154,547	380,841	411,761
France	201,874	263,689	247,422	303,780
Germany, West	211,126	348,049	475,533	435,859
Ireland	98,525	105,252	104,077	136,511
Italy	191,587	215,367	337,208	352,900
Netherlands	574,463	694,152	866,792	702,103
Norway	60,800	53,023	62,475	65,355
Spain	44,336	9,462	19,300	20,875
Sweden	50,160	28,822	28,323	42,601
United Kingdom 3/	495,588	605,658	579,262	540,834
Total	2,127,389	2,856,831	3,520,521	3,382,934
Other countries:				
Hong Kong	485	1,050	272	217
Japan	934,731	961,871	911,840	942,363
Total	935,216	962,921	912,112	942,580
Total of above	5,251,227	6,237,741	6,697,836	6,050,974

1/ Preliminary. 2/ Includes high-test molasses. 3/ Includes invert sugar.

Source: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research and related information.

December 1979 Commodity Programs, FAS, USDA

MOLASSES, INDUSTRIAL: EXPORTS OF SPECIFIED COUNTRIES
AVERAGE 1971-75 AND ANNUAL 1976 THROUGH 1978
(In Metric Tons)

Continent and Country	Average 1971-75	1976	1977	1978 1/
North America:				
Cuba 2/	393,474	315,772	394,773	300,574
Dominican Republic	191,393	261,036	245,097	254,024
Guatemala	75,217	283,564	159,915	137,907
Jamaica 3/	85,888	60,787	43,405	46,831
Mexico	421,070	435,645	508,132	620,628
Nicaragua 3/	32,112	67,923	63,498	66,649
Trinidad and Tobago	48,470	56,402	31,094	40,238
United States	37,593	59,498	121,448	106,714
Total	1,285,217	1,540,627	1,567,362	1,573,565
South America:				
Brazil	745,410	843,643	1,041,000	778,000
Eucador	27,936	28,570	69,554	28,391
Guyana	69,158	62,348	90,224	104,749
Total	842,504	934,561	1,200,778	911,140
Europe:				
Belgium and Luxembourg	24,434	156,432	164,398	183,259
France	315,285	273,128	344,196	271,205
Germany, West	42,390	101,798	93,303	43,463
Netherlands	367,227	239,939	280,826	252,075
United Kingdom 4/	44,996	53,345	41,472	69,099
Total	794,332	824,642	924,195	819,101
Africa:				
Mauritius	150,233	129,100	194,700	180,000
Mozambique	85,017	95,000	90,000	15,574
South Africa, Republic of	175,000	153,000	197,000	102,300
Total	410,250	377,100	481,700	297,874
Asia:				
Indonesia	209,964	169,085	67,135	203,780
Philippines	523,726	792,755	548,442	387,908
Thailand	373,063	722,063	953,176	742,030
Turkey	52,396	91,950	88,800	119,097
Total	1,159,149	1,775,853	1,657,553	1,452,815
Oceania:				
Australia 5/	226,181	301,018	280,648	172,941
Fiji	80,800	72,000	90,000	121,000
Total	306,981	373,018	370,648	293,941
Total of above	4,798,433	5,825,801	6,202,236	5,348,436

1/ Preliminary. 2/ Compiled from statistics of importing countries.
3/ Includes edible molasses. 4/ Includes invert sugar. 5/ Crop year ending June 30 of year indicated.

Source: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

December 1979 Commodity Programs, FAS, USDA

MOLASSES, INDUSTRIAL: PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1970/71-1974/75, ANNUAL 1975/76-1979/80 1/
(IN THOUSANDS OF METRIC TONS)

REGION AND COUNTRY	AVERAGE 1970/71-1974/75	1975/76	1976/77	1977/78	1978/79	1979/80
NORTH AMERICA:						
CANADA 2/	53	92	83	80	73	83
COSTA RICA	54	84	72	66	70	80
CUBA 3/	1,262	1,364	1,391	1,436	1,296	1,203
DOMINICAN REPUBLIC	353	373	428	384	425	428
EL SALVADOR	94	107	129	156	158	154
GUATEMALA	136	227	238	201	181	189
HAITI	23	21	21	19	23	25
JAMAICA	143	118	119	116	135	126
MEXICO	1,191	1,227	1,076	1,340	1,410	1,500
NICARAGUA	84	111	118	117	108	99
PANAMA	38	53	66	71	87	87
TRINIDAD-TOBAGO	84	66	89	81	80	79
UNITED STATES	1,673	1,813	1,960	1,600	1,625	1,489
US-HAWAII	284	288	275	276	292	280
US-PUERTO RICO	129	124	109	100	108	102
OTHER	149	133	156	202	219	246
TOTAL	5,750	6,201	6,330	6,245	6,290	6,170
SOUTH AMERICA:						
ARGENTINA	563	557	557	599	818	820
BRAZIL	2,089	2,400	3,000	5,400	5,200	4,658
CHILE	37	49	66	28	20	16
COLOMBIA	258	257	235	244	262	262
ECUADOR	79	105	96	88	101	126
GUYANA	132	144	115	165	175	148
PERU	332	336	327	319	300	325
URUGUAY	26	38	27	31	27	23
VENEZUELA 2/	277	227	222	242	220	240
OTHER	78	200	195	173	173	175
TOTAL	3,872	4,313	4,840	7,289	7,296	6,793
WESTERN EUROPE:						
EC:						
BELGIUM-LUXEMBOURG	174	187	184	203	231	228
DENMARK	132	183	159	173	150	151
FRANCE	1,092	1,013	1,087	1,050	920	1,000
GERMANY, WEST	675	842	831	781	665	670
IRELAND	41	48	87	61	58	57
ITALY	362	330	330	340	380	385
NETHERLANDS	253	261	303	303	330	300
UNITED KINGDOM	338	255	310	100	103	111
TOTAL EC	3,066	3,119	3,291	3,011	2,837	2,902
AUSTRIA	89	205	64	79	51	51
FINLAND	33	31	34	36	41	40
GREECE	79	130	124	127	127	129
SPAIN	241	285	467	480	484	362
SWEDEN	85	93	102	95	97	97
SWITZERLAND	20	18	26	20	23	22
TOTAL	3,612	3,881	4,108	3,848	3,660	3,603
EASTERN EUROPE:						
HUNGARY	140	140	217	222	228	230
POLAND	517	642	670	673	657	581
ROMANIA	195	180	293	266	276	297
YUGOSLAVIA	175	230	201	222	232	264
OTHER	588	514	665	809	736	792
TOTAL	1,615	1,706	2,046	2,192	2,129	2,164
TOTAL EUROPE	5,227	5,587	6,154	6,040	5,789	5,767
SOVIET UNION	2,998	2,735	2,700	3,242	3,306	3,062
AFRICA:						
ANGOLA	21	24	24	29	31	31
EGYPT 4/	218	258	263	319	330	350
MAURITIUS	176	198	292	288	284	300
MOZAMBIQUE	102	90	90	117	137	137
SOUTH AFRICA	570	629	712	762	674	625
OTHER	391	483	452	456	501	527
TOTAL	1,478	1,682	1,833	1,971	1,957	1,970
ASIA:						
CHINA, TAIWAN	336	261	261	360	380	380
INDIA	1,739	1,700	2,059	2,976	3,000	2,400
INDONESIA	272	330	330	460	565	646
IRAN	216	234	234	300	299	298
JAPAN	173	164	164	189	177	180
PHILIPPINES	872	1,050	940	808	873	890
THAILAND	684	901	1,223	962	1,059	810
TURKEY	225	286	381	407	391	403
OTHER	1,021	1,085	1,275	1,303	1,333	1,325
TOTAL	5,539	6,011	6,867	7,765	8,077	7,332
OCEANIA:						
AUSTRALIA	565	620	642	642	577	592
FIJI	89	95	95	103	84	97
TOTAL	654	715	737	745	661	689
WORLD TOTAL	25,517	27,244	29,461	33,297	33,376	31,783

1/ In each country the year of production is the same as that for centrifugal sugar production. 2/ Calendar year; first year shown in heading.
3/ Includes high-test molasses. 4/ May include edible molasses.

Source: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source material, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.
DECEMBER 1979

COMMODITY PROGRAMS, FAS, USDA

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